
Supplier Contract Management

Importing Contracts and Amendments

2.0 – Original Version
Last Update – 11/30/2015 sclingan

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Importing a Previously Executed Contract through the SCM module

The below process is only the foundation in order to create the Amendment/Renewal in PeopleSoft from the original executed contract prior to the agency SCM go-live date.

Scenario:

A Procurement (i.e. transactional) contract does **not** exist and must be created prior to creating the SCM document. I need to import the executed SCM document in PeopleSoft in order to do a **future** amendment/renewal within SCM. Original executed contract is on the public search portal.

Before you begin, you will need to complete the following tasks:

1. Vendor must be in PeopleSoft and tied to an active Bidder ID;
2. When was the original contract executed. Date?
3. Do you have amendments to import as well? How many?

Navigation = Supplier Contracts > Create Contracts & Documents > Contract Entry > Add a New Value

Contract Entry

Find an Existing Value Add a New Value

SetID: STIND

Contract ID: NEXT

Contract Process Option: General Contract

Add

1. Enter **Administrator/Buyer** = Contract Manager (PS User ID)
2. Choose **Vendor Name** or **Vendor ID**
3. Confirm/Enter **Begin Date (original Contract date)** and **Expire Date**
4. Enter the **Maximum Amount** (this includes original contract and any amendment amounts)
5. Enter Contract **Description**

- Enter **Line Items** or a **Line Category**; or if this is a Zero based contract the Line Category must be **01234567**. (Choose only one of the two options.)

Contract Categories

Lines

Details Pricing Options Release Amounts Spend Threshold

Line	Category	Description	Status
1	01234567	SCM \$0 Contract	Active

Save Notify Refresh Add Update/Display Correct Hi

- Click **PO Defaults** hyperlink and enter **Business Unit**
- Choose/enter **Ship To** ID (required)

Contract Entry

PO Defaults

SetID: STIND Contract ID: NEXT Version: 1 Vendor ID: 0000053500

Header

*Business Unit: 00061 [Copy from BU Defaults](#)

Vendor Loc:

Buyer:

Origin:

Currency: USD CRRNT

Payment Terms ID: AREAR

Billing Location: 061CONT

☒ Tax Exempt 0003118568

Shipping Information

Ship To: [Ship To Address](#)

Location:

IN Unit:

Freight Terms: FOB DEST

Ship Via:

Charge By: Quantity

AM Business Unit:

☐ Capitalize

Profile ID:

Cost Type:

Ultimate Use Code:

Where Performed:

Distributions


*GL Unit	Fund	Account	Program	Dept	Bud Ref	PC Bus Unit	Project	Activity	St Ty
00061									

[Add Comments](#)

OK Cancel Refresh

- Enter Agency **Department** (required)
- Click **OK**
- Complete **Tier 2** details (all fields must be populated **IF** there are participants)
- SAVE**

15. Click **Add a Document** pushbutton

Contract Version			
Version:	1	Status:	Current
		Approval Due Date:	08/01/2014 
Hackett, Angelina - 00061			Add a Document


The **Create Document** page will appear.

Create Document

Source: Purchasing Contracts [Return to Document Search](#)


SetID: STIND Contract ID: 0000000000000000000010051


Vendor: XEROX STATE & LOCAL SOLUTIONS INC


*Document Type: 

Configurator ID:

*Description:

*Administrator:  Kerr,Gina-061

Sponsor: 

Department:  Department Of Administration

*Requisition Type:

[Internal Contacts/Signers](#)
[External Contacts/Signers](#)

18. Click **Import Document** pushbutton

19. **Import Option = Current Contract/Document** is the default. (if there are amendments to import, go to page 6)

Import Option

☒ **Current Contract/Document**
(Current Contract/Document with no formal amendments or history to load.)

☐ **Amended Contract**
(Single current contract as fully amended requiring an amendment number. History is optional.)

☐ **Amended Contract and Amendment**
(Current contract as fully amended and a current separate amendment summary file. History is optional.)

☐ **Original and Amendment**
(Original contract as originally signed and a current separate amendment summary file. History is optional.)

20. The below fields are now available:

Import Option

☒ **Current Contract/Document**
(Current Contract/Document with no formal amendments or history to load.)

☐ **Amended Contract**
(Single current contract as fully amended requiring an amendment number. History is optional.)

☐ **Amended Contract and Amendment**
(Current contract as fully amended and a current separate amendment summary file. History is optional.)

☐ **Original and Amendment**
(Original contract as originally signed and a current separate amendment summary file. History is optional.)

Current Version Personalize | Find | First 1 of 1 Last

Basic Info Details

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document						Upload	Clear

Prior Version is not applicable

Done with Import Cancel

A. Original Contract

- Version = 1.0**
- Status = Executed**
- Status Date = Date contract was executed**
- Click the **Upload** pushbutton and load file

Note: If you get a message as noted below, decrease the size of the file name = < 60 characters.

Message

Attachment failed to upload. (18036,10013) Attachment operation failed for unknown reasons. (Attachment built-in error 12). (18036,10003)

OK

21. After file has been uploaded, the grid should look like this:

Current Version

Personalize | Find | First 1 of 1 Last

Basic Info

Details

Type	File Name	Version	Status	Status Date	Status Time	Upload	Clear
Contract Document	Xerox Imorted amendment.pdf	1.00	Execute ▼	06/01/2011			

Prior Version is not applicable

Done with Import

Cancel

22. Click **Done with Import**

Message

Are you sure you are done with import? (10420,576)

If you click Yes, system will save the imported files. You may no longer change them. If you click No, you may go back to reload a previously imported file.

Yes

No

a. Click **Yes** if you have no changes. No further edits will be available.

23. **Document Management** page after file has been imported:

<h2>Document Management</h2>		Return to Document Search	
SetID:	STIND	Contract ID:	000000000000000000012850
Vendor:	CTW ELECTRICAL CO INC		
Document Type:	SOI_Price Increase		
Description:	From Req ID - 0000065227		
Administrator:	Sharon Clingan		
Sponsor:		Department:	065361 INDOT - Fleet

Version:	1.00	Created On:	06/01/14 12:00AM	Document Details
Status:	Executed	Last Modified On:	07/25/14 11:08AM	
		Executed On:	06/01/14 12:00:00AM	

Imported Document

View and Edit Options: <input type="button" value="View Document"/> Modify Attachments/Related Documents Document Version History	Review and Approval: Internal Contacts/Signers External Contacts/Signers Clearance Check Add External User	Other Document Actions: <input type="button" value="Send to Contacts"/> <input type="button" value="Deactivate Document"/>
---	---	---

NOTE: When you are ready for the Amendment/Renewal, you will proceed to click the **Create Amendment** pushbutton.

Following are steps if the Original Contract and prior Amendments need to be imported

24. **Import Option** = Current Contract/Document is the default, **but** if you have more than one document to upload (ie. an amendment or multiple amendments/renewals) then.....

Import Option

☒ **Current Contract/Document**
(Current Contract/Document with no formal amendments or history to load.)

☐ **Amended Contract**
(Single current contract as fully amended requiring an amendment number. History is optional.)

☐ **Amended Contract and Amendment**
(Current contract as fully amended and a current separate amendment summary file. History is optional.)

☐ **Original and Amendment**
(Original contract as originally signed and a current separate amendment summary file. History is optional.)

25. Select **Original and Amendment** radio button

The below fields are now available:

Current Version Personalize | Find | First 1-2 of 2

Basic Info **Details**

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Original Contract				Executed			Upload	Clear
Amendment File							Upload	Clear

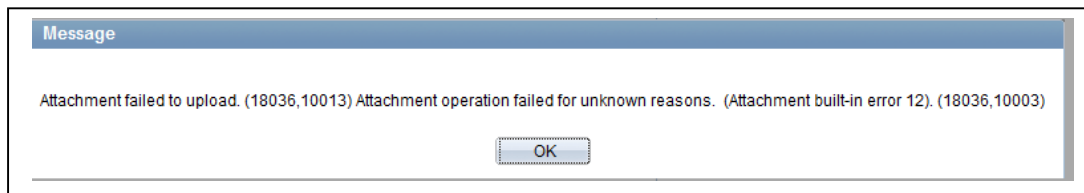
To specify Prior Versions enter an Amendment number greater than 0 in the Current Version grid.

A. Original Contract

- Version = 1.0
- Status Date = Date contract was executed
- Click the **Upload** pushbutton and load file

B. Amendment File (This is your most recent Amendment/Renewal file)

- a. **Version** = 2.0
- b. **Amendment #** = this is the amendment # (if you are uploading multiple amendments this would be the number of amendments being uploaded)
- c. **Status** = Executed
- e. **Status Date** = Date Amendment was executed
- f. Click the **Upload** pushbutton and load file (if you get an error when uploading the file, it is due to the file name being too long. Reduce the file name and try again.)
Example of error below:



Current Version								
Basic Info		Details						
Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Original Contract	QPA_11437 - 12_31_2013.pdf	1.00		Executed	09/01/2013		Upload	Clear
Amendment File	QPA_11437 - 12.31.2014.pdf	2.00	2	Execute	2/01/2014		Upload	Clear

- C. Expand the **Prior Versions** grid to add additional Amendments (i.e. #1. Please note that the executed (i.e. Status Date Fields) must be in chronological order when importing numerous Amendment Files. (i.e. Current to the Oldest)

Prior Versions (Optional)								
Basic Info		Details						
Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Amendment File	76319-000.pdf	3.00	1	Executed	9/1/2013		Upload	Clear

Done with Import Cancel

(If you have more than two Amendments to upload, see Page 9 for an example)

D. Amendment File

- a. Version = 3
- b. Amendment # = will default
- c. Status = Executed
- d. Status Date = Date Amendment was executed

- e. Click the Upload pushbutton and load file
- f. Repeat steps a-e for all corresponding amendments/renewals

Prior Versions (Optional)

Basic Info Details [icon]

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Amendment File	76319-000.pdf	3.00	1	Executed	9/1/2013		[Upload]	[Clear]

[Done with Import] [Cancel]

Click **Done with Import**

Message

Are you sure you are done with import? (10420,576)

If you click Yes, system will save the imported files. You may no longer change them. If you click No, you may go back to reload a previously imported file.

Yes

No

Version

Amendment

Status

Status Date

Status Time

URL

Click **Yes** if you have no changes. No further edits will be available.

Note: To view uploaded contract documents, go to the **Document Version History** hyperlink. The original contract and Amendments can be found quickly by:

- a. **Document Action** = Executed

Document History

SetID: STIND

Contract ID: 0000000000000000000013301

Vendor: NORTHCENTRAL UNIVERSITY INC

Amendment Option: Amendment Files Only

Document Action: Executed

[View Source Version History](#)
[Return to Document Management](#)

Document History

Personalize | Find | View All | First 1-3 of 3 Last

Action/Version

Comments

Document Details

Select	DateTime▼	Document Action▲	Last User to Take Action	Version	Amendment	Supplemental Documents
<input type="checkbox"/>	05/01/15 12:00AM	Executed	Sharon Clingan-067-GMIS	2.00	2	
<input type="checkbox"/>	04/01/15 12:00AM	Executed	Sharon Clingan-067-GMIS	3.00	1	
<input type="checkbox"/>	03/20/15 12:00AM	Executed	Sharon Clingan-067-GMIS	1.00		

Compare Selected Word Documents

[Return to Document Management](#)

Document Management page after files have been imported:

[illegible]

NOTE: When you are ready for the next Amendment, #8, you will proceed to click the **Create Amendment** pushbutton.

Example of the Import page when multiple Amendments are being imported:

Import Option

☐ Current Contract/Document
(Current Contract/Document with no formal amendments or history to load.)
 ☐ Amended Contract
(Single current contract as fully amended requiring an amendment number. History is optional.)
 ☐ Amended Contract and Amendment
(Current contract as fully amended and a current separate amendment summary file. History is optional.)
 ☒ Original and Amendment
(Original contract as originally signed and a current separate amendment summary file. History is optional.)

Current Version

Basic Info

Details

PDF

Personalize

Find

Print

First

1-2 of 2

Last

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Original Contract	QPA_10051-ACS-Electronic_Payment_Card_Program_MSA_(2).pdf	1.00		Executed	07/19/2001		<input type="button" value="Upload"/>	<input type="button" value="Clear"/>
Amendment File	QPA_10051 - Xerox_State_Local_Solutions - Amendment 7.pdf	2.00	7	Execute	10/28/2011		<input type="button" value="Upload"/>	<input type="button" value="Clear"/>

Prior Versions (Optional)

Basic Info

Details

PDF

Personalize

Find

View All

Print

First

1-6 of 6

Last

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Amendment File	QPA_10051 - Xerox_State_Local_Solutions_Amendment 6.pdf	3.00	6	Executed	08/10/2011		<input type="button" value="Upload"/>	<input type="button" value="Clear"/>
Amendment File	QPA_10051-ACS-Electronic_Payment_Card_Program_Amendment5.pdf	4.00	5	Executed	06/30/2011		<input type="button" value="Upload"/>	<input type="button" value="Clear"/>
Amendment File	QPA_10051-ACS-Electronic_Payment_Card_Program_Amendment 4.pdf	5.00	4	Executed	11/16/2011		<input type="button" value="Upload"/>	<input type="button" value="Clear"/>
Amendment File	QPA_10051-ACS-Electronic_Payment_Card_Program_Amendment 3.pdf	6.00	3	Executed	01/16/2001		<input type="button" value="Upload"/>	<input type="button" value="Clear"/>
Amendment File	QPA_10051-ACS-Electronic_Payment_Card_Program_Amendment 2.pdf	7.00	2	Executed	03/24/2001		<input type="button" value="Upload"/>	<input type="button" value="Clear"/>
Amendment File	QPA_10051-ACS-Electronic_Payment_Card_Program_Amendment 1.pdf	8.00	1	Executed	06/27/2001		<input type="button" value="Upload"/>	<input type="button" value="Clear"/>

Done with Import

Cancel

Amendments/Renewals from Imported Contracts

The process to create amendments/renewals from an Imported Contract differs slightly from SCM contracts created and executed within Supplier Contract Management.

If contract amount needs amended or there is an increase to the executed contract amount, the following processes will occur. **If there is no price increase, proceed to Step 3.**

1. Create new Requisition;
2. After Requisition is approved and budget checked; increase the transactional Procurement Contract Amount to include the amended amount.

New W

[Contract](#) | [Tier 2 Details](#)

Contract Entry

Contract

SetID: STIND		Contract Version	
Contract ID:	000000000000000000013034	Version:	1
*Status:	Approved	Status:	Current
		Approved Date:	07/16/2014
Seq#:			
Location:	REMIT001		
Administrator/Buyer:	M240207	Lawson, Megan-061	
▼ Authored Document			
Authored Status:	Executed	Document Version:	0.01
		Amendment:	0
			Maintain Document
▼ Header			
Process Option:	General Contract	Add Comments	Activity Log
Vendor:	FAWILHELMC-001	Contract Activities	Document Status
Vendor ID:	0000109045	Primary Contact Info	Thresholds & Notifications
	FA WILHELM CONSTRUCTION CO INC	Contract Header Agreement	
Begin Date:	07/02/2014	Contract Releases	
Expire Date:	06/30/2015		
Renewal Date:		Amount Summary ?	
Currency:	USD CRRNT	Maximum Amount:	800.00 USD
Primary Contact:	Contact Name:	Line Item Released Amount:	800.000
Vendor Contract Ref:		Category Released Amount:	0.000
Description:	Public Works Electrical and Dr	Open Item Released Amount:	0.000
Master Contract ID:		Total Released Amount:	800.000

3. Change Contract Status = **Open**
4. Adjust the **Maximum Amount** to include the amended price, if applicable.
5. If applicable, update the **Expire Date** field
6. Click **PO Defaults** hyperlink to verify that a **Business Unit, ShipTo & Dept** is noted

Order Contract Options

<input checked="" type="checkbox"/> Allow Multicurrency PO	<input type="checkbox"/> Allow Open Item Reference	<input type="checkbox"/> Must Use Contract Rate Date	Rate Date:	10/06/2014
<input checked="" type="checkbox"/> Corporate Contract	<input type="checkbox"/> Adjust Vendor Pricing First	<input checked="" type="checkbox"/> Auto Default		
<input type="checkbox"/> Lock ChartFields	<input type="checkbox"/> Price Can Be Changed on Order			

[PO Defaults](#)
[Add Open Item Price Adjustments](#)
[Price Adjustment Template](#)

Voucher Contract Options

9. Document Management page = notice the **Imported Document** tag
 - a. Click **Create Amendment** pushbutton

Document Management

[Return to Document S](#)

SetID: STIND Contract ID: [000000000000000000013113](#)

Vendor: STAPLES CONTRACT AND COMMERCIAL

Document Type: 00061 Coordinated Sourced MSA

Description: Staples new contract - will import Executed Document

Administrator: Lawson, Megan-061

Sponsor: Department: 493000 Office of Technology

Version: 1.00 Created On: 04/01/14 12:00AM [Document Details](#)

Status: Executed Last Modified On: 07/18/14 3:31PM

Executed On: 04/01/14 12:00:00AM

[Reset to Dispatch](#)

[Create Amendment](#)

[Imported Document](#)

10. Message regarding Clearance Check – Click **Yes** to continue

Message

Creating an amendment will delete the existing clearance check and require a new one, continue? (30000,228)

[Yes](#) [No](#)

11. Create an Amended Version
 - a. **Amendment Option** = accept Default
 - b. **Amendment Configurator ID** = Click on look up icon to get a list of valid values

Create an Amended Version

Select amendment option, desired version and comment as to why the amendment is necessary and press OK. Document(s) will then be generated based on amendment option.

Amendment Option: [Amendment Files Only](#)

Amendment Configurator ID: [Look Up](#) Does this contract require IOT approval? [No](#)

Version:

☐ Reset Version back to 0.00

☒ Minor Version (1.01)

☐ Major Version (2.00)

*Comments: Amendment Created: [Add Comment](#)

[OK](#) [Cancel](#)

- c. Select the **Configurator ID** based on original contract

SetID	Configurator ID	Description
STIND	SOI AMEND_IMPORT	SOI Imported Amendment
STIND	SOI IBM_IMPORT_AMEND	IBM Ordering Agreement Amendment used for Imported Docs
STIND	SOI RENEW_IMPORTED	Renewals that DO allow a price increase
STIND	SOI RENEW_NO_IMPORT	Renewals that DO NOT allow a price increase

SOI Amend Import = SOI Imported Amendment

SOI IBM Import Amend = IBM Ordering Agreement Used for Imported contracts

SOI Renew Imported = Renewals that DO allow a price increase

SOI Renew NO Import = SOI Renewals that do NOT allow for a price increase

- d. Select **Yes** or **No** by clicking the drop down arrow whether this Amendment/Renewal requires IOT approval.

Select the desired versioning option and enter a brief description describing the changes. Click the OK button to proceed and the process to generate the new document will be started.

Document Type:

Amendment Option:

Amendment Configurator ID:

Zero Amount Amendment:

Version: ☐ Same Version (1.01) ☒ Minor Version (1.02) ☐ Major Version (2.00)

*Comments:

OK Cancel

Does this contract require IOT approval?

- e. **Zero Amount Amendment** = select Yes or NO. If NO, then input the amount of the Amendment only. If Yes, no further action required.
- f. **Version** = Accept default (do NOT change)
- g. **Comments** = if you want to add additional comments, please do so.
- h. Click **OK**

Create an Amended Version

Select amendment option, desired version and comment as to why the amendment is necessary and press OK. Document(s) will then be generated based on amendment option.

Amendment Option:

Amendment Configurator ID:

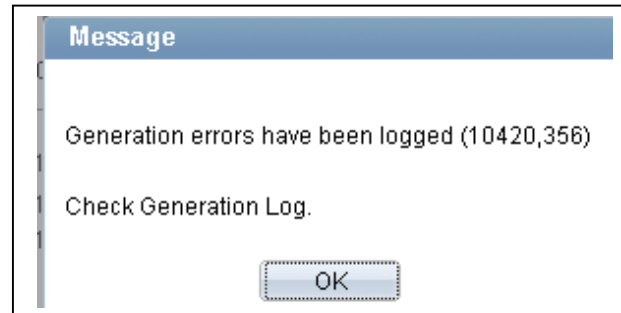
Does this contract require IOT approval?

Version: ☐ Reset Version back to 0.00 ☒ Minor Version (1.01) ☐ Major Version (2.00)

*Comments:

OK Cancel

12. Click **OK** to message:



13. **Document Management** page:

<h2>Document Management</h2>				Return
SetID:	STIND	Contract ID:	000000000000000000013113	
Vendor:	STAPLES CONTRACT AND COMMERCIAL			
Document Type:	00061 Coordinated Sourced MSA			
Description:	Staples new contract - will import Executed Document			
Administrator:	Lawson, Megan-061	Transparency ID:		
Sponsor:		Department:	493000	Office of Technology
<hr/>				
Amendment:	1	Created On:	04/01/14 12:00AM	Docum
Version:	1.01	Amended On:	07/20/14 3:43PM	
Status:	Draft	Last Modified On:	07/20/14 3:43PM	
<hr/>				
Includes Imported Document				
<hr/>				
View and Edit Options:		Review and Approval:		Other D
<button>View Original Document</button>		<button>Route Internally</button>		<button></button>
<button>View Amendment File</button>		<button>Route Externally</button>		<button></button>
<button>Edit Amendment File</button>		<button>Preview Approval</button>		<button>Pre</button>
		<button>Print Contract Details</button>		<button></button>

The below processes in detail can be found in prior documentation (i.e. SCM Instructional Guide; Text Document -Step 4; Page 16). Creating amendments must go through the same processes as original Contracts. In summary, they are as follows:

14. Click **Edit Amendment File** pushbutton
15. **SAVE**
16. **Open**
17. Enter the missing variables (i.e. Agency Name) as they will be noted by "%%".

RENEWAL #1
Contract #0000000000000000000013113

Pursuant to IC 5-22-17-4 and the terms of the contract/grant, %%AGENCY_NAME%% (the "State") exercises its option to renew its contract/grant with STAPLES CONTRACT AND

- a. Enter **Agency Name** also within the signature box:

In Witness Whereof , Contractor/Grantee and the State have, through their duly authorized representatives, entered into this renewal. The parties, having read and understood the foregoing terms of this renewal, do by their respective signatures dated below agree to the terms thereof.	
STAPLES CONTRACT AND COMMERCIAL	%%AGENCY_NAME%%
By:	By:

18. Edit document as required
19. Accept all changes if **no** Internal Collaboration is required
20. **SAVE**
21. Check IN
22. Browse/Upload
23. Internal Collaboration (send to internal contacts)
24. Finalize Collaboration
25. Click **External Contacts/Signers** hyperlink.
 - a. If this is **not** the Vendor who will sign, click Cancel and create a new External User ID (see prior documentation, "**SCM Instructional guide, Step 5 – Page 29**")
 - b. If this is correct, enter the **Contact Name**
 - c. Check the Primary Document & Required to Sign checkboxes (Allow Document View checkbox will automatically be checked)
 - d. Click **OK**

26. If you need to create a new External User ID; click **OK**
27. Click **Add External User** hyperlink to create new User ID

28. Prepare Document for Signing

- a. Click **Prepare Document for Signing**

Other Document Actions:

- Send to Contacts
- Recreate Document
- Compare Documents
- Prepare Document for Signing



- b. Review **List of Signers** and follow directions on the page



Prepare Document for Signatures

Please review the following list of signers and make sure that the list contains the correct people who need to sign the document. Internal signers must be in this list in order to have access to the document and see the correct buttons. If the list is not correct, go back to the internal or external contact list and make any necessary changes on those pages.

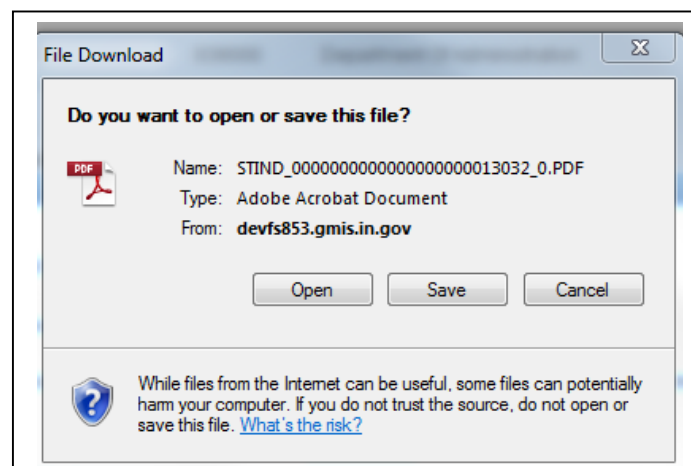
Once everything is okay, press the OK button to convert the document to the correct type for signing.

SetID:	STIND	Contract ID:	0000000000000000000013032
Vendor:	3M COMPANY		

Internal List of Signers		Personalize Find View All  First 1 of 1 	
User	Signing Title	Visible Signer	Sign Order
		<input type="checkbox"/>	

External List of Signers		Personalize Find View All  First 1 of 1 	
Contact Name	Contact Title		
Megan Fields	Vice President		

- c. Click **OK** (Please make note of the **Processing**) (click Cancel if changes are required)
- d. Click **Open** to the Adobe message and **OK** to the PeopleSoft message about preparing the document (i.e. Enable Usage Rights for Adobe Reader)



- e. The file will remain **Checked Out** pending certification

Version:	0.01	Created On:	05/29/14 11:39AM	Document Details
Status:	Draft	Last Modified On:	05/29/14 5:55PM	
		Checked Out On:	05/29/14 5:55PM	
		Checked Out By:	S278315	

Pending document certification by administrator

View and Edit Options:	Review and Approval:	Other Document Actions:
View Document	Internal Contacts/Signers	Cancel Signature Process
Upload Prepared Document	External Contacts/Signers	Generation Log

- f. **SAVE** the .pdf (make note where file is SAVED)

- g. Return to PeopleSoft and click **Upload Prepared Document** (if you attach a different file, you will get a message when attempting to upload)

Version:	0.03	Created On:	07/01/14 1:37PM	Document Details
Status:	Collaborated	Last Modified On:	07/07/14 2:11PM	
		Checked Out On:	07/07/14 2:11PM	
		Checked Out By:	S278315	

Pending document certification by administrator

View and Edit Options:	Review and Approval:	Other Document Actions:
View Document	Approval Details	Cancel Signature Process
Upload Prepared Document	Internal Contacts/Signers	Generation Log

- h. Browse; Upload

[Sharon Clingan 2014-07-07-14.11.09.000000] Document Prepared for Signatures

View and Edit Options:	Review and Approval:	Other Document Actions:
View Document	Preview Approval	Send to Contacts
Sign Document (On Behalf)	Submit for Approval	Cancel Signature Process
Add Attachments/Related Documents	Bypass Approvals	Deactivate Document
Document Modification Summary	Route for Internal Signatures	Generation Log
Document Version History	Approval Details	

29. Click **Send to Contacts**
 - a. **Delivery Method** = Email and Online Signatures
 - b. **Files To Be Sent** defaults to Amendment Files/Most Recent Only

Send to Contacts		
SetID:	STIND	Contract ID:
Vendor:	STAPLES CONTRACT AND COMMERCIAL	
Version:	1.02	
Amendment:	1	
Administrator:	Lawson, Megan-061	
Email:	XXMLawson@idoa.IN.gov	
'Delivery Method:	<div>Email and Online Signatures</div>	
Send as File Type:	<div>(Invalid Value)</div>	<div>Preview</div>
<p>The Send as File type option only applies to Email Delivery Method and when signature document is not available. Otherwise, the prepared signature document will be sent regardless of file type specified here.</p>		
<div>Files To Be Sent</div> <div><div><input type="checkbox"/> Original Executed Document</div><div><input checked="" type="checkbox"/> Amendment Files</div><div><input checked="" type="radio"/> Most Recent Only</div><div><input type="radio"/> All</div><div><input type="checkbox"/> Attachments</div><div><input type="checkbox"/> Related Documents</div></div> <div><div><input type="checkbox"/> Set to Checked Out</div><div><input checked="" type="checkbox"/> Send Copy to Administrator</div></div>		

30. Click **OK**
31. Vendor signs and returns
32. Agency Signature
33. Perform **Clearance Check** (this needs to be completed prior to Submitting SCM document for the workflow approval process)
34. Route for Approval (when contract is fully Approved, contract manager will get an email)
35. After Contract has been Approved; then Dispatch (**Manual**)
36. **Execute**
 - a. Message will display as follows:

Message

Should this contract be placed on the Indiana Transparency Portal? (30000,231)

By answering Yes, the contract will be viewable to the public on the Transparency Portal.

By answering No, the contract will be marked as confidential and will NOT be viewable on the Transparency Portal.

Yes

No

